HBS – THE TOTAL SALES PROCESS

HBS mi-Zone

User Guide

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Introduction to mi-Introducer and mi-Zone

mi-Introducer is the first ever system that provides the vital link between a mortgage broker and their introducer. This system links to the Advisor's system, mi-Zone.

Leads are the lifes blood of a successful mortgage broking business. So it is important that you provide your introducers with the tools to do the job properly for you. In doing so you:

- have a method of getting the maximum number of leads possible
- provide a slick, professional system for doing it
- receive the leads whilst they are still very hot
- give the introducer the ability to check on cases to be confident they are being dealt with

mi-Introducer does this and so much more. It provides a totally professional approach to what is often a very hit and miss affair.

For your existing Introducers it shows them your commitment to them and that you are serious about the relationship. For winning new lead business imagine being able to demonstrate a physical process for referring leads and managing them. They cannot fail to be impressed.

It is amazing that the vital role of lead production is so often a very chaotic, unstructured, inefficient process. With mi-Introducer those days are over.

How do mi-Introducer and mi-Zone work?

Setting It Up

mi-Introducer provides a simple uncomplicated system for the creation, delivery and monitoring of leads.

Initially your Introducer needs to be set up with access to the system. The system is all online so setting up is simplicity itself. We provide a separate User Guide for them to set the system up and for the general use of it.

mi-Introducer passes leads to the mi-Zone system which is accessed by clicking on the mi-Zone button (the blue one with the documents graphic on it) in the Portal section of the front screen of your HBS as shown in the following screenshot. It can also be accessed from our website from the Logon Tab.

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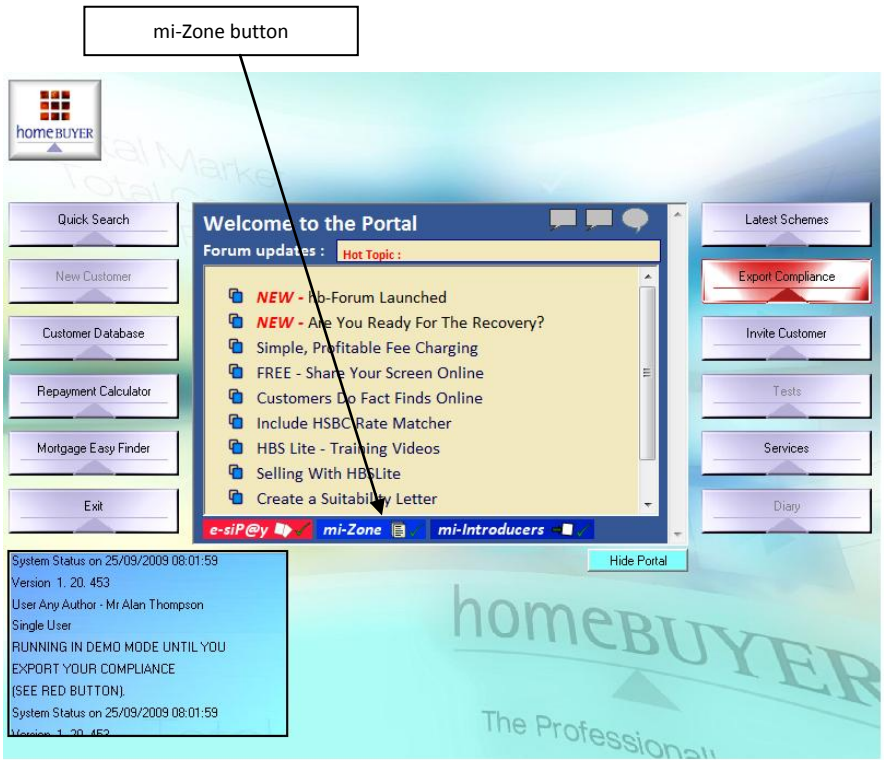
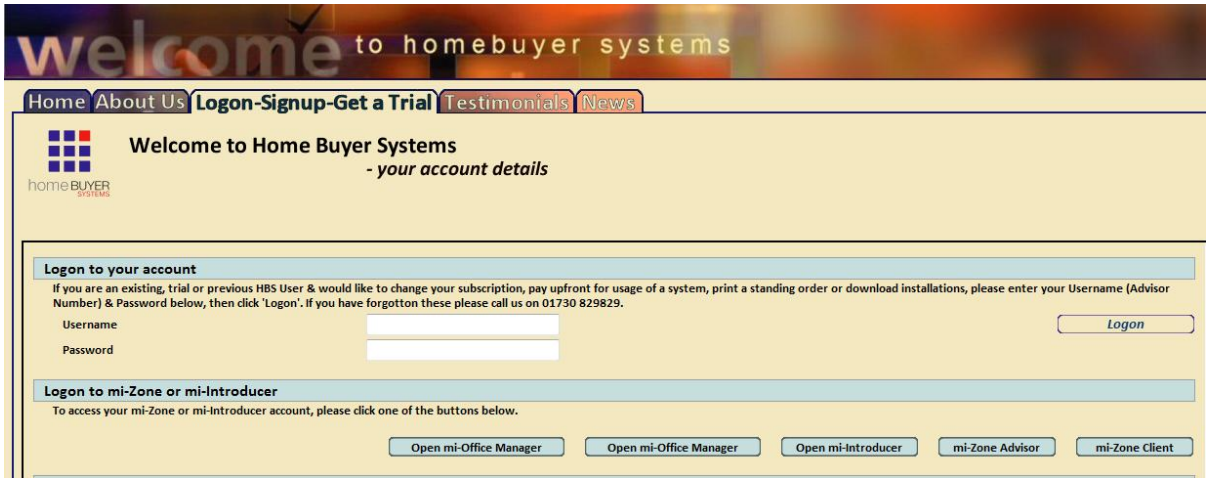
HBS User Logon



Having clicked the mi-Introducer button this brings up your "Dashboard", the screen you control everything from.

Non HBS User Logon

For customers not using the HBS mortgage sourcing system, which of course includes Introducers, access can be gained from our website www.homebuyersystems.com. By clicking on the "Logon-Signup-Get a Trial" Tab and then by clicking "mi-Zone Advisor" button in the "Logon to mi-Zone or mi-Introducer" section you can open your system.



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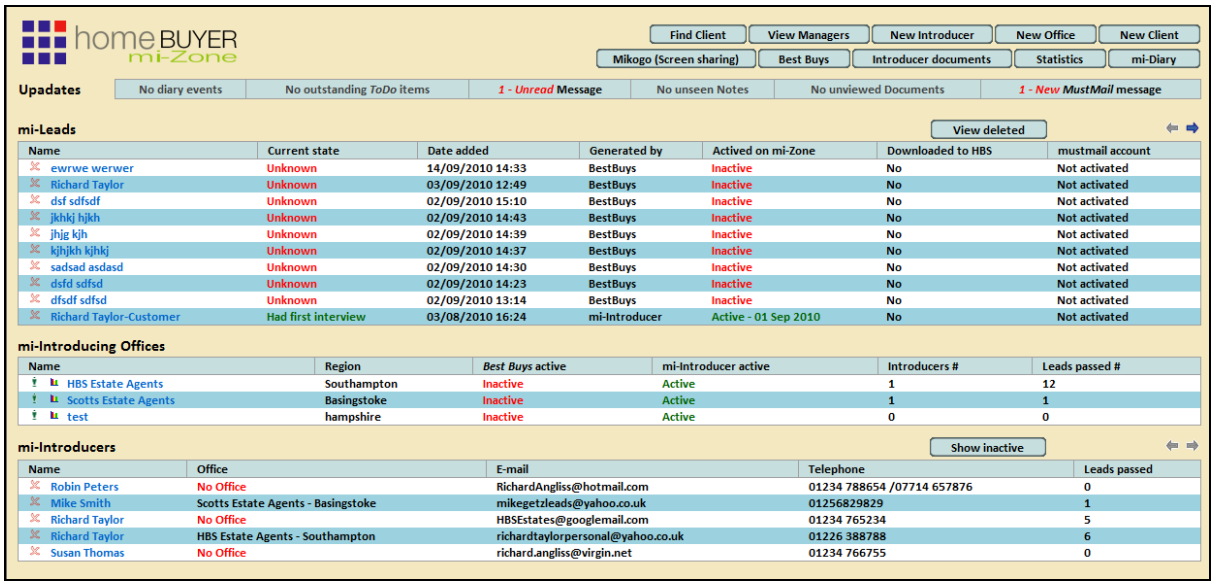
Overview of the "Dashboard"



The screen is divided in to 4 main sections:

- **Updates** - At the top of the screen the "Updates" area gives you a snapshot of where you are with things and very importantly allows you to ensure you are always on top of everything. This is obviously very important in managing the relationship with your Introducers.
- **mi-Leads** – this shows all the leads (starting with the most recent) that you have received and records their progress. By clicking them you open up the case so that you can update it
- **mi-Introducing Offices** – this shows all the different companies or offices of each of your Introducers
- **mi-Introducers** – within each office there may be many people who introduce to you (e.g Negotiators in an Estate Agents office) in this section they are recorded here

For each of these section if you click on "Name" it will open up a screen that gives you the specific details for what you have clicked.

At the very top of the screen are the "Task buttons.

The Task Buttons are:

- **Find Client** – this allows you to search for a customer
- **View Managers** – set up and view the senior personnel of your Introducer Offices who you give access to the system for management information purposes

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- **New Introducer** – this is where you add a new Introducer either as an individual or to an existing Office (see below)

- **New Office** – in many cases you will have a company that introduces to you and they may have several members of staff and possibly several branches e.g an Estate Agent branch will have several Negotiators and the Estate Agent may have several offices. This gives you the ability to set up the "Office" and then add members of staff using the "New Introducer" function described above

- **New Client** – this gives you the ability to manually add details of a lead

- **Mikogo (screen sharing)** – this is a system that allows you to share your computer screen with a customer to allow remote selling and admin

- **Best Buys** – if you have a subscription to Best Buys you can access it from here

- **Introducer Documents** – you can supply your Introducers with documents such as sales aids. Attaching them to this area will automatically make them available in your Introducers mi-Introducer system

- **Statistics** – this is where you can view your Introducers activity, productivity and so on

- **mi-Diary** – this is where you view the appointments that your Introducers have made for you

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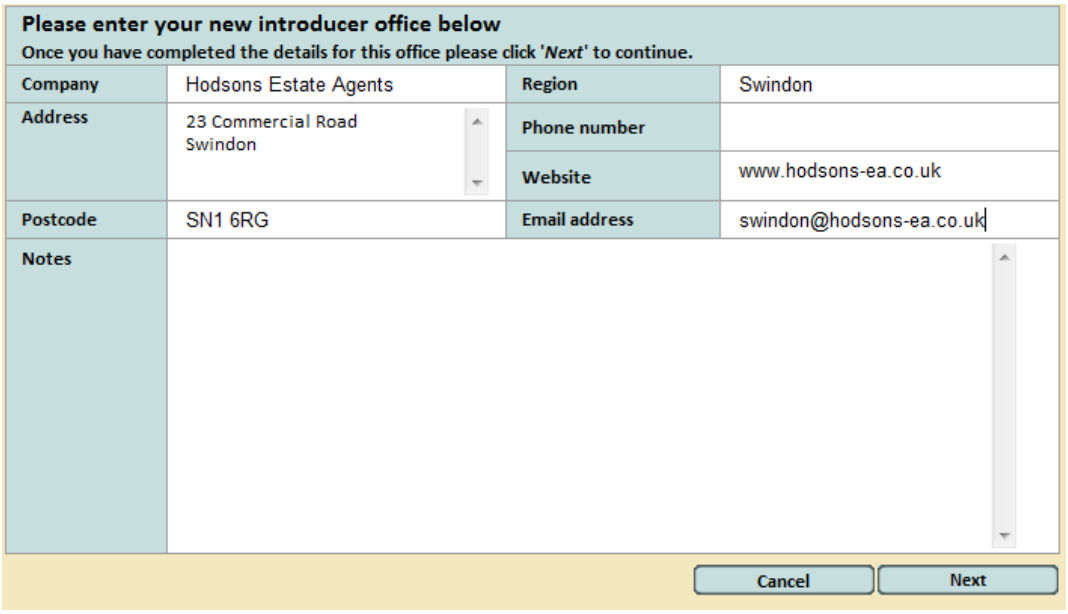
Setting Up Your Introducers

The following section explains how you set up your Introducers.

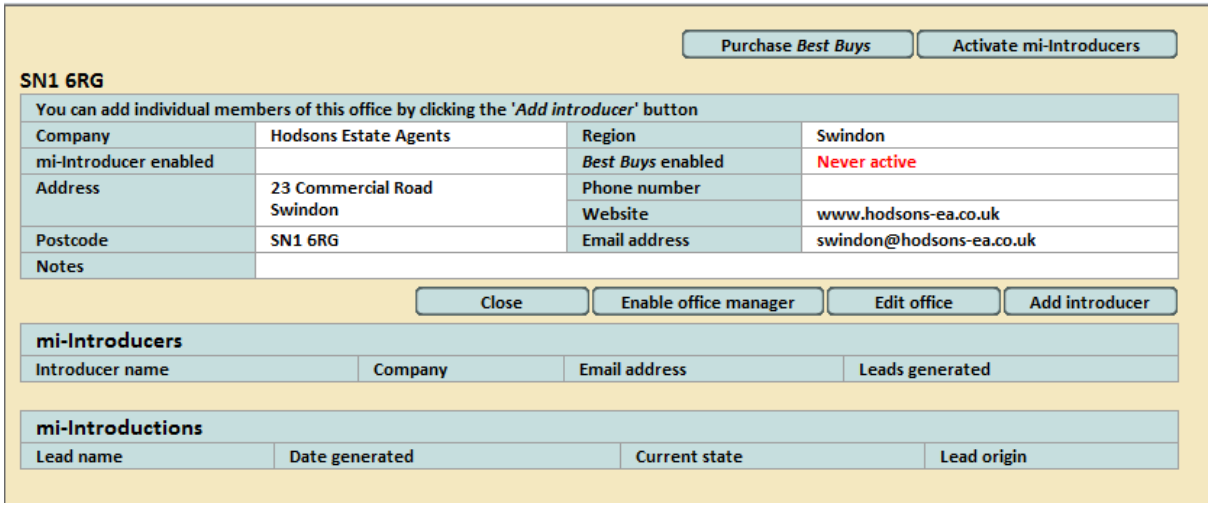
You can set up individual introducers or several Introducers under one “Office”

In most cases such as Estate Agents there is likely to be more than one Introducer per branch so in the first place you set up the office and then add the Individuals.

To do this click the “New Office” button and add the details as shown in the following example:

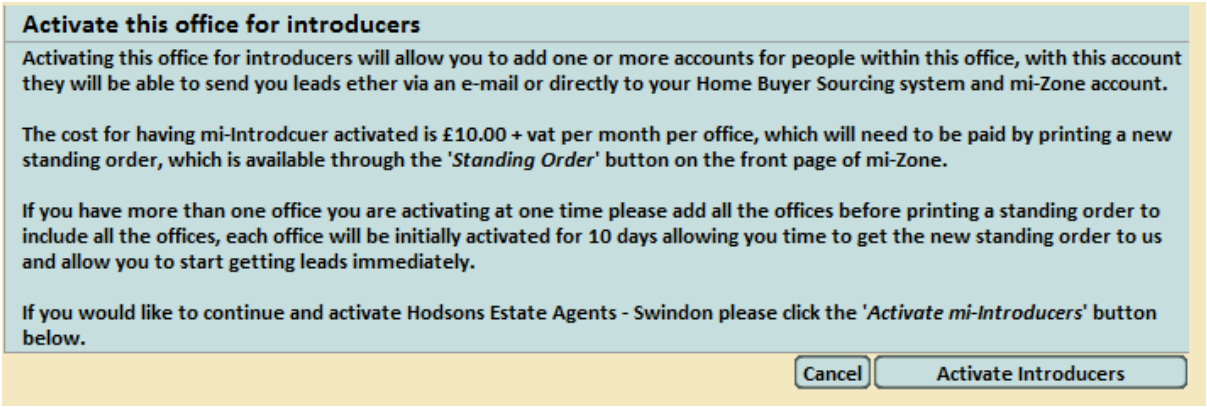


Then click the “Next” button and you will see the set up view of the “Office”. This will be where you come to check each office to check the Introducers and the leads the office has produced.

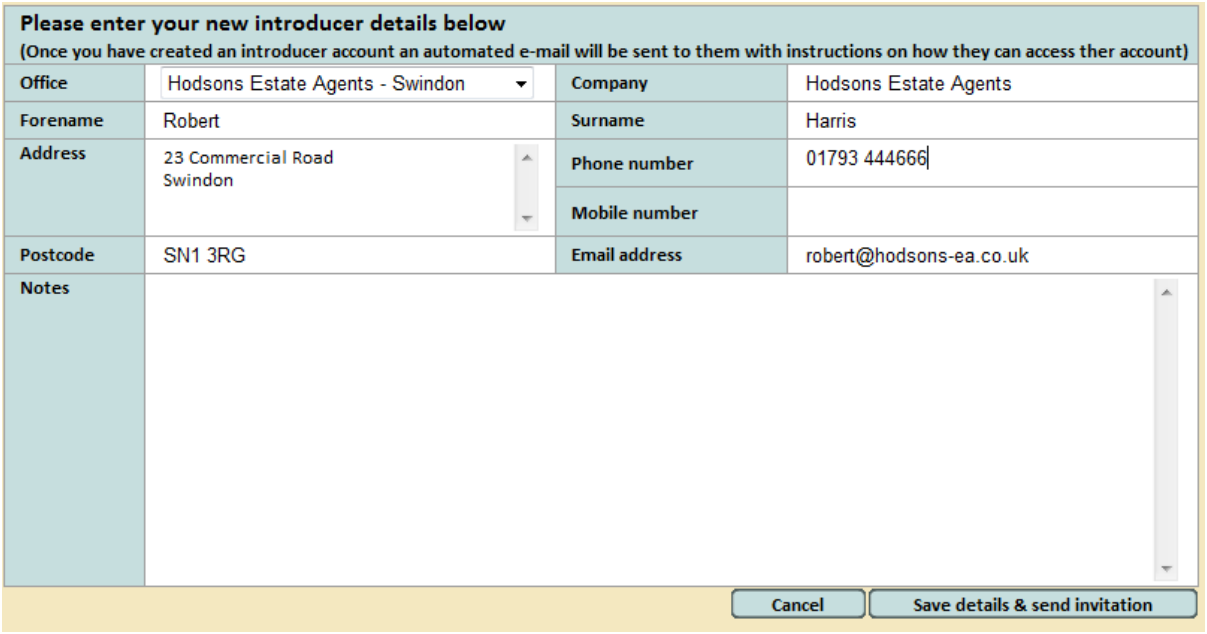


You MUST then click the “Activate mi-Introducers” button to make it go live and to be able to then add Introducers to this office.

Once clicked you will see the following screen, click the “Activate Introducers” button to proceed.



Next to add the Introducers click the “Add introducer” button and complete the details



Then click the “Save details & send invitation” button. This will send an e-mail to the Introducer inviting them to install the link to their mi-Introducer system. We supply separate instructions for them on how to install the link to their “Dashboard”.

They will then receive the following e-mail:

Dear Robert,

I am sending this e-mail to you to set up the Introducer system that we are supplying you with to enable us to work together efficiently.
Setting this up is very simple

- Open your web browser and navigate to http://www.HomeBuyerSystems.com
- At the top of the screen click on the button that says 'Logon-Signup-Get a trial'
- Click on the button halfway down the screen that says 'Open mi-Introducer'
- Type in your e-mail address ('homebuyersystems1@hotmail.com') and the password 'Tennis'
- You must then create your own password and check your details, then click 'Continue' to enter the mi-Introducer Home page
- Once you're logged onto the system you can click the button 'Add to favourites' to bypass the logon stage

Now you're in and can start sending customer information to Alan, by clicking the 'Send basic contact information ...' button which will allow you to send very basic details to your advisor, or if you would like to send more information you can click 'Complete a short factfind now' which will allow you complete a very brief factfind.

If you would like to contact Alan Thompson you can by phone on 01234 453321 or 07711 121477 or by e-mail on richard.angliss@homebuyersystems.com

Many Thanks

Home Buyer Systems Ltd.

You can then add further Introducers to the “Office” if there are others. When they complete the set up you will automatically receive an e-mail that lets you know they have done it.

They can now start using the system to send you leads. As previously mentioned there is a separate User Guide for your Introducers for the installation and how to use their side of the system.

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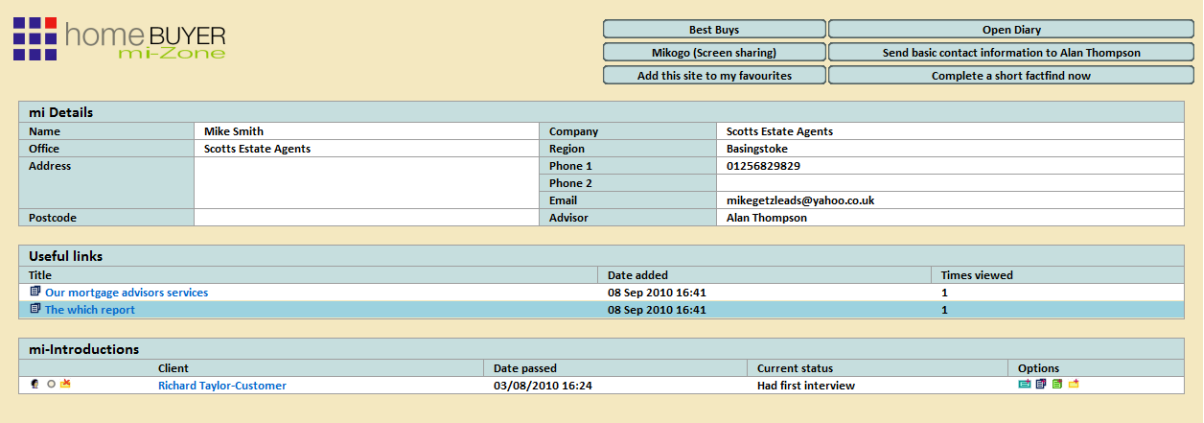
Using mi-Introducer

This section gives you an overview of how lead generation from your Introducers and management of the relationship is handled very simply by mi-Introducer, allowing you to keep the admin to a minimum and your earnings potential to a maximum.

It is so important that everyone involved in the process is able to use the system be they an Introducer, management of an Introducing firm or you. The system is very simple so this is not an onerous task and the benefits of spending a short period of time becoming familiar with the system will pay over and over again.

To understand how to use your side of the system it helps to understand the Introducers side, so we will track the process from start to finish to give you a full appreciation of how the system works.

Using mi-Introducer – The Introducers System



This is the Introducers "Dashboard" i.e the screen they see when they open the system.

The screen has the operating buttons at the top of the screen and then three sections that are:

mi-Details – This is simply where their details are displayed

Useful links – Your system allows you to place documents in to the Introducers system that they might find useful, such as a brochure you may have about you and your company

mi-Introductions – This is where they can access the clients they have referred to you. To do this they simply click the name. Also under "Options" they are given the ability to administer the customer by adding notes, sending messages to you, adding documents they receive that you need to see and add diary events.

So as you can see they have all the tools to send, track and interact with you.

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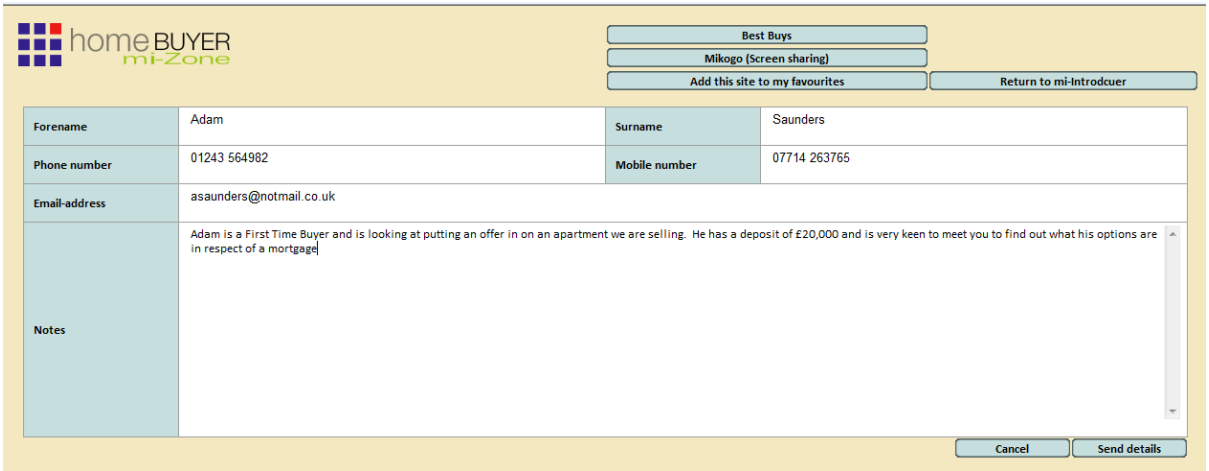
Sending a Lead

Of course the essential function of the system is to send leads. There are two ways to do this. They can either send you:

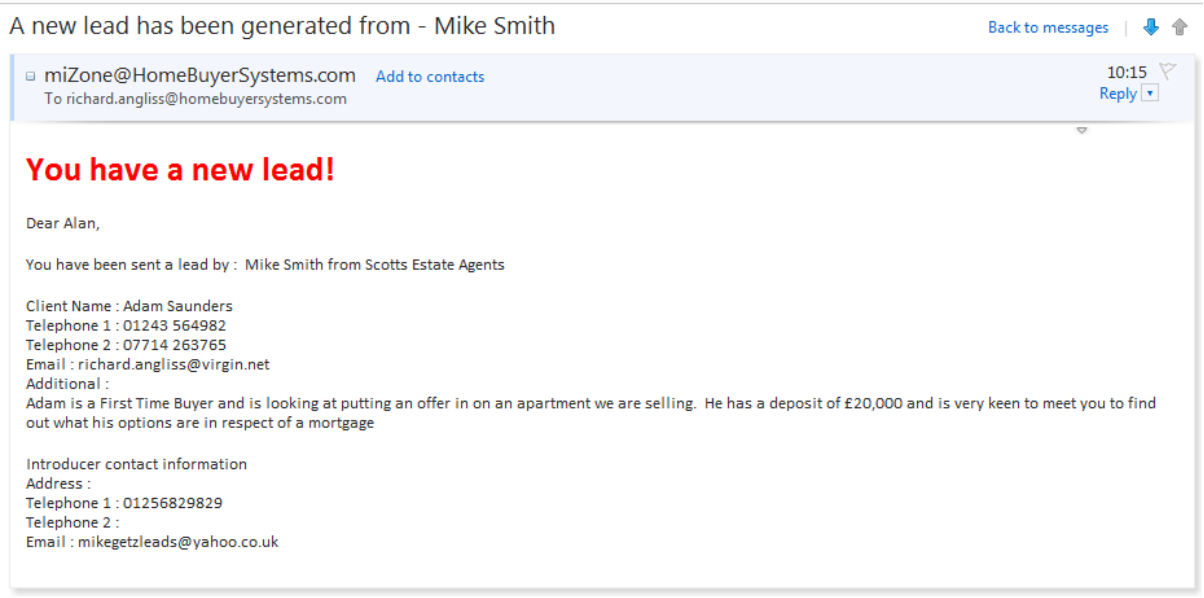
- simple details using the free hand messaging
- more concise details using the mini factfind

Simple Text Leads

To do this they click the "Send basic contact information to ***your name***" button.



They simply fill in the details, type the message and then click the "Send details" button. You will then immediately receive an e-mail like the one shown here giving you the details:



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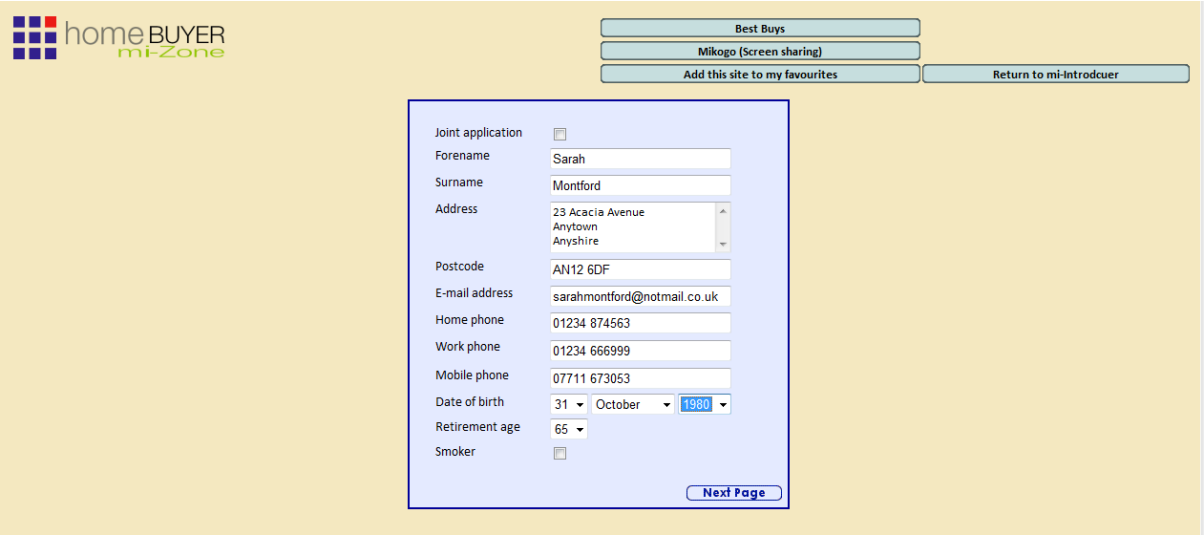
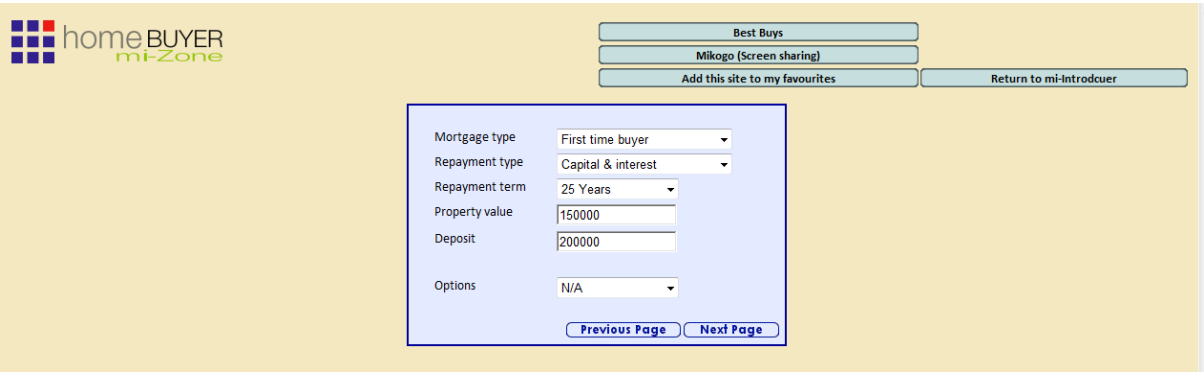
Mini Factfind Leads

The other way for your Introducer to provide leads is by provide basic details of their circumstances.

To do this they click the “Complete a short Factfind now” button. The following screen will appear:



The first screen takes basic details the second screen takes financial details:



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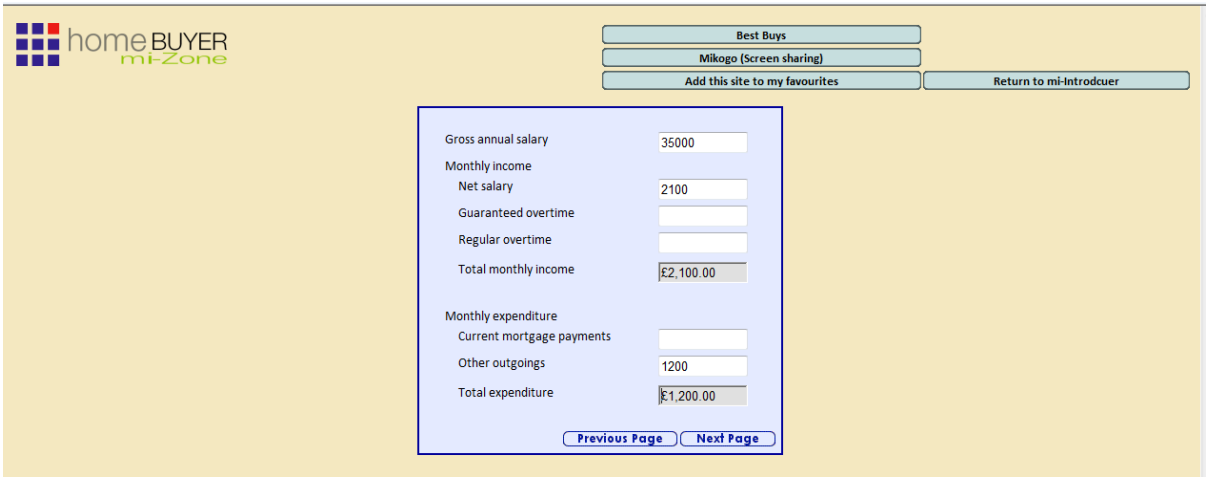
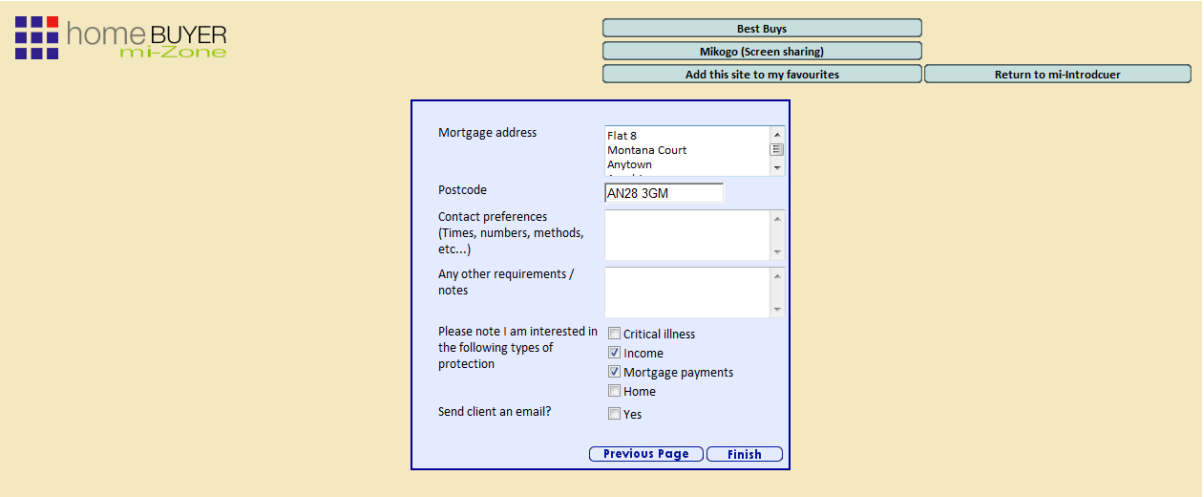
The third screen takes income and expenditure details:



The fourth and final screen takes the following details:



NB – Please Note that your Introducer can complete as much as or as little of this information as you and they agree you would need. There is no compulsion to have to provide everything

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Once they have completed the information they click “Finish” and then you will immediately receive an e-mail like this:

A new downloadable lead has been generated from - Mike Smith at Scotts Estate Agents Back to messages

miZone@HomeBuyerSystems.com Add to contacts
To richard.angliss@homebuyersystems.com
10:47
Reply

You have a new lead!

Dear Alan,

A new lead has been generated by Mike Smith from Scotts Estate Agents

Client Name : Sarah Montford
Telephone 1 : 01234 874563
Telephone 2 : 07711 673053
Email : sarahmontford@notmail.co.uk

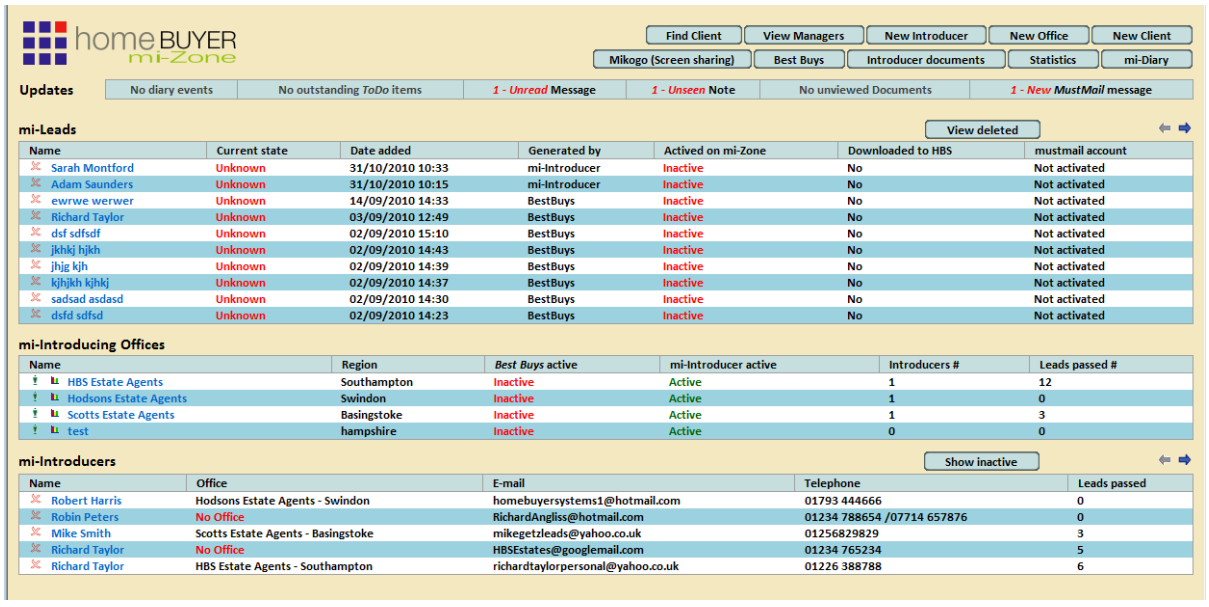
Introducer contact information
Address :
Telephone 1 : 01256829829
Telephone 2 :
Email : mikegetzleads@yahoo.co.uk

Many Thanks

Home Buyer Systems Ltd.

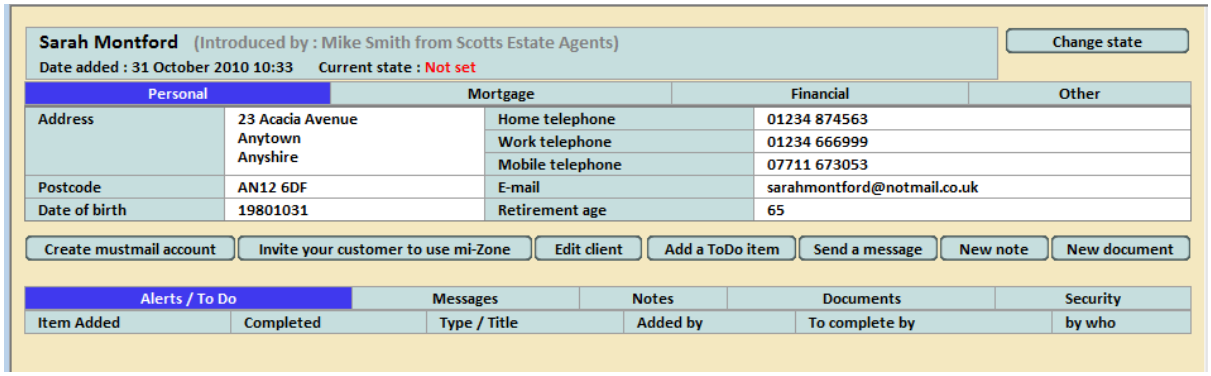
Administering the Leads

Now turning to your mi-Introducer Dashboard you will now see the new lead (or leads in this case – Adam Saunders and Sarah Montford)



If you use HBS for mortgage sourcing you will also find that the details are available ready to source in your system.

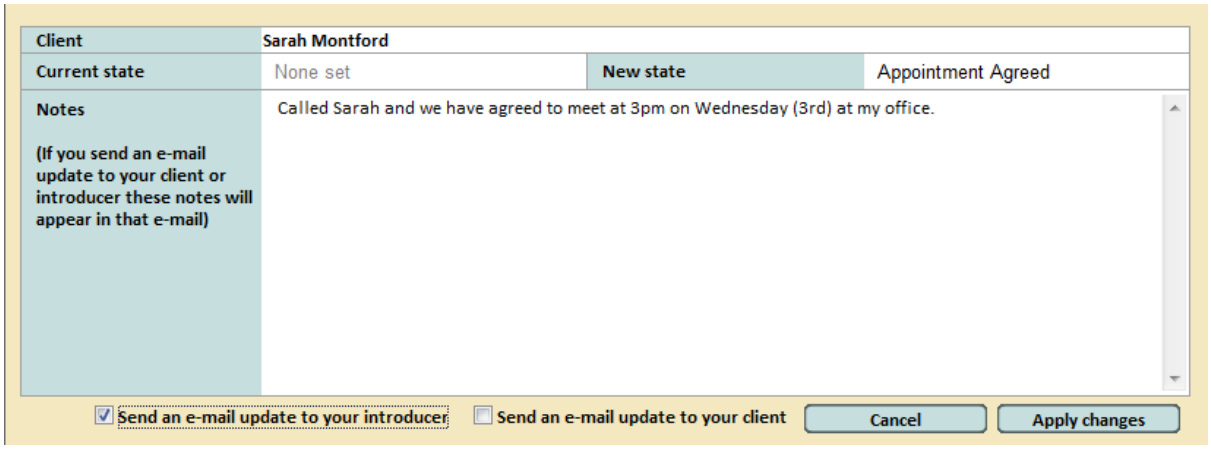
You would then begin work on the lead. To do this click on the name of the customer in the mi-Leads section and you will see the following screen:



Really this is about the stages the Lead goes through to its conclusion and that is done by using the Change State button.

In the first instances the "Current State" is set to "Not set" the aim is for you to change this as it progresses to a sale or not, as the case may be. Each time you update it the person that introduced the case to you is immediately updated through the system by e-mail and by making the change to the customer record on their mi-Introducer system.

So for instance the most likely first step would be to make contact and then record the outcome:



Once you have added what the "New state" is and typed a message into the "Notes" section you can click the "Send an e-mail to your Introducer" and if appropriate "Send an e-mail to your client".

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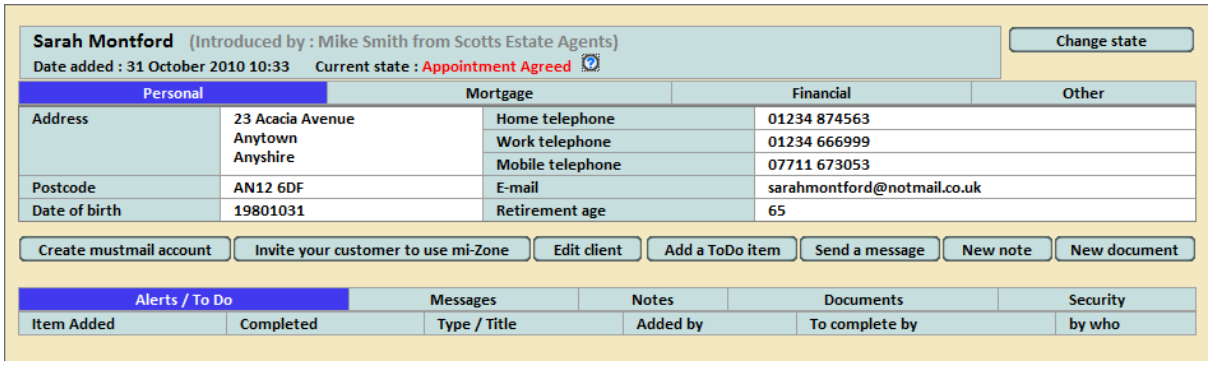
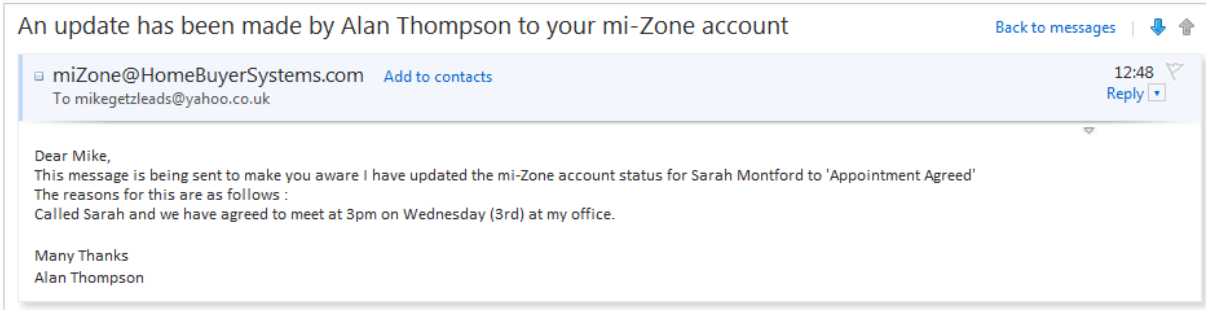
Then click “Apply changes”. This will take you to the screen you were on previously but now it will be displaying the details you have just added.

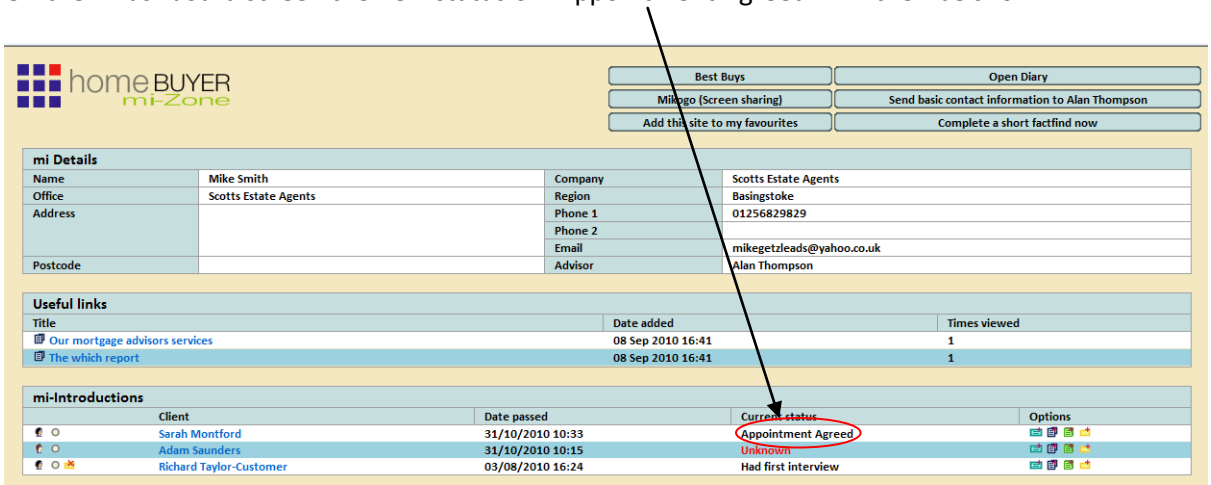


You will notice that the “Current state” has now changed to “Appointment Agreed”. If you click the “?” symbol the note you entered will be shown.

Your Introducer will receive the following e-mail:

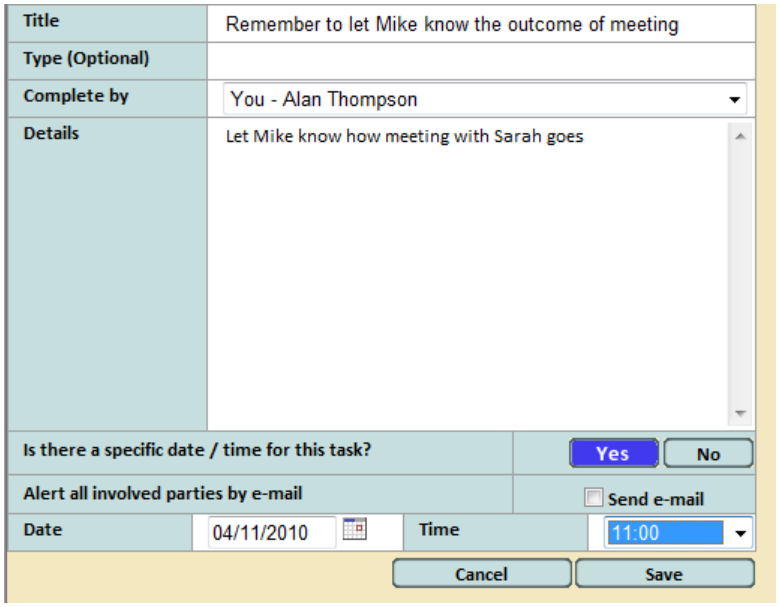


On their Dashboard screen the new status of “Appointment Agreed” will then be shown:



After the appointment you would update the “Current state” to whatever the outcome of the meeting was and when you change it. The e-mail and update of the dashboard process will happen again as explained above.

When entering the “Current state” you may wish to use the “Add To Do item” facility to remind you. Simply complete the details and then click the “Yes” button to enter the time and date you want to be reminded.



As well as the “Add To Do Item” button there are several others, which are:

Create must mail account – this is for use with our mi-Zone system and creates a unique e-mail address for your customer for use on application forms so that lenders correspond directly with it

Invite your customer to use mi-Zone – this sets up a mi-Zone account for your customer so that you can use this to work with them to help them make applications for a mortgage and insurance products

Edit client – If you need to add details top a customer’s record or change anything clicking this button will give you access

Send a message – this allows you to send a message to your customer or Introducer

New note – you can add notes here

New document – if you wish to add a document for the customer to view then click this button to add it

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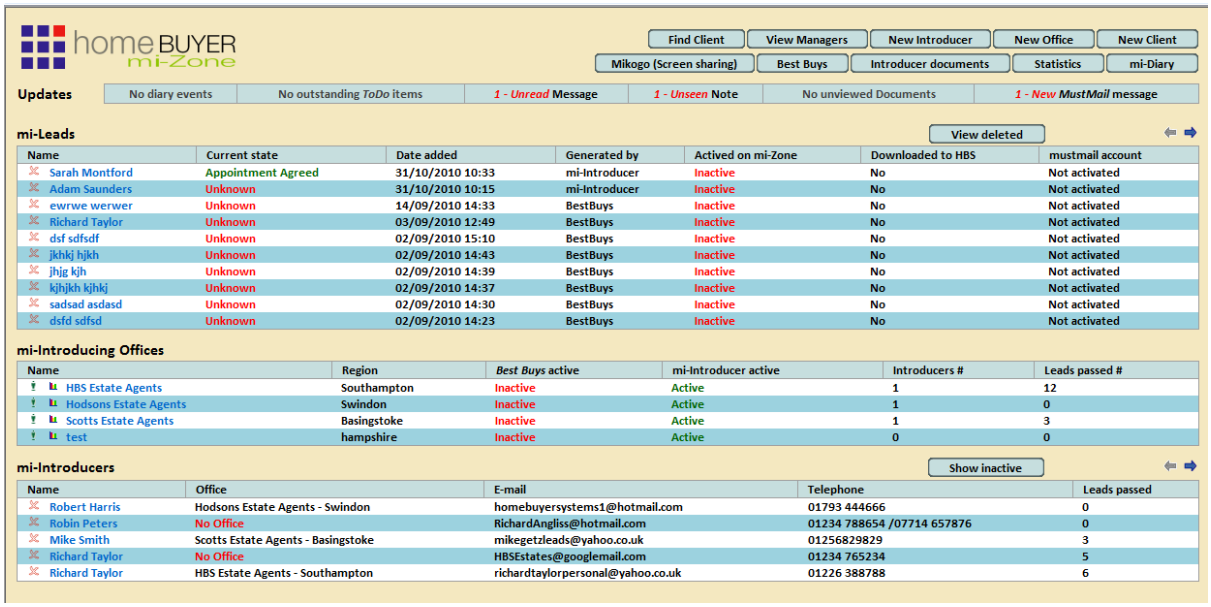
Other Advisor Dashboard Features



At the top of your Dashboard screen are several buttons some of which we have already used such as “New Introducer” and “New Office”.

Here is a guide to the rest:

Find Client – this allows you to search for clients to find them quickly

View Managers – the system allows for managerial staff of the Introducing companies to have access. Here you can add Managers, edit them and so on

New Client – to add clients that have not been sent to you click on this button and enter theri details here

Mikogo (screen sharing) – Mikogo is a free system that allows you to share your computer screen with a customer. This button gives access to it

Best Buys – If you subscribe to Best Buys this gives you access to the area where you can administer it

Introducer Documents – this is where you can add documents you would like your Introducers to have such as sales aids. When you add the document here the Introducer will find that they then have access to it from the “Useful links” section of their Dashboard

Statistics – This is where you can check the statistics for your Introducers

mi-Diary – You access your diary from here

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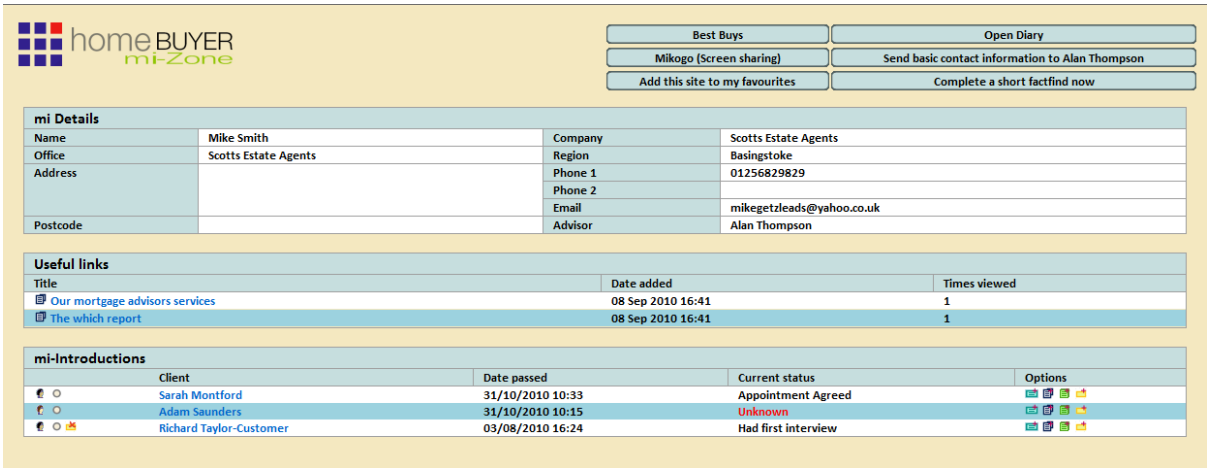
mi-Diary

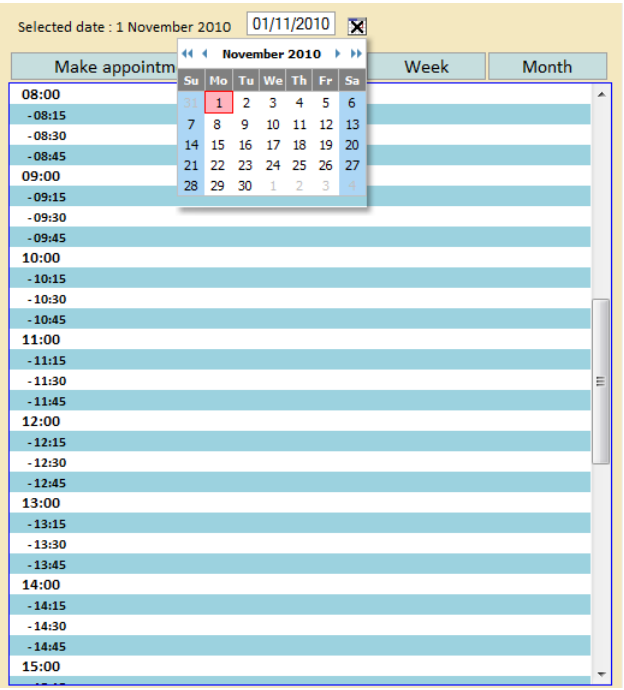
This feature allows your Introducer to book appointments directly into a Diary. The reason this feature was requested was because by doing so it commits the customer rather than wait for you to contact them to book an appointment.

Customers said that they would rather have this and move appointments round than not have a customer committed to an appointment. Of course you do not have to use it if you would prefer not to.

So to demonstrate how it works we start at the Introducers Dashboard as shown below.

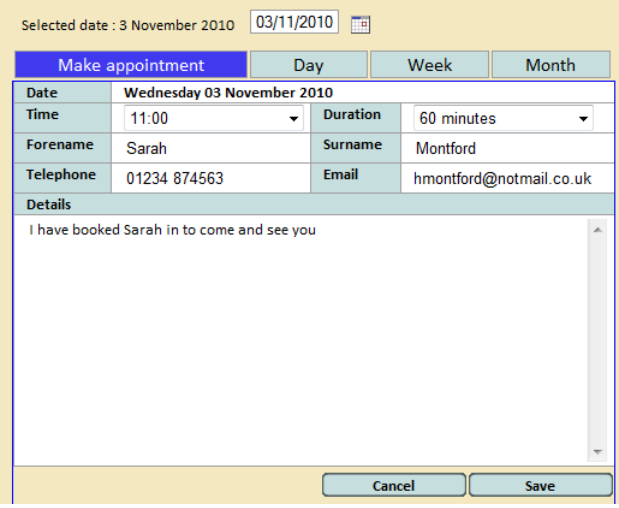


To access your Diary they click the “Open Diary” button.

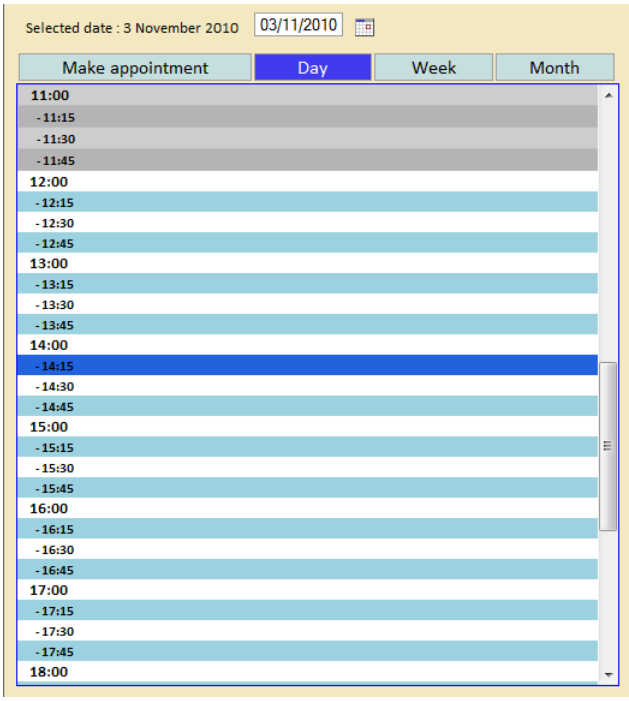


To then add an appointment they click the calendar icon which appears next to the current date at the top of the screen and then select the day they wish to book the appointment for.

This will then bring up the following screen where they will enter the details.



Once the details have been entered they click “Save” the appointment will appear and have blocked out the time slot. This will prevent any other appointments being made for this time slot.



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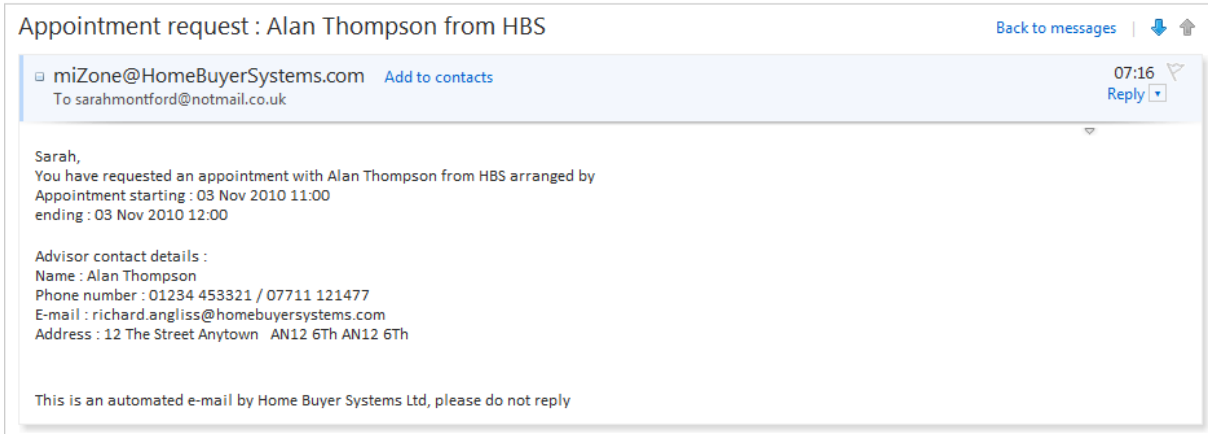
The customer will receive confirmation of the appointment by e-mail:



Appointment request : Alan Thompson from HBS

Back to messages

miZone@HomeBuyerSystems.com Add to contacts
To sarahmontford@notmail.co.uk

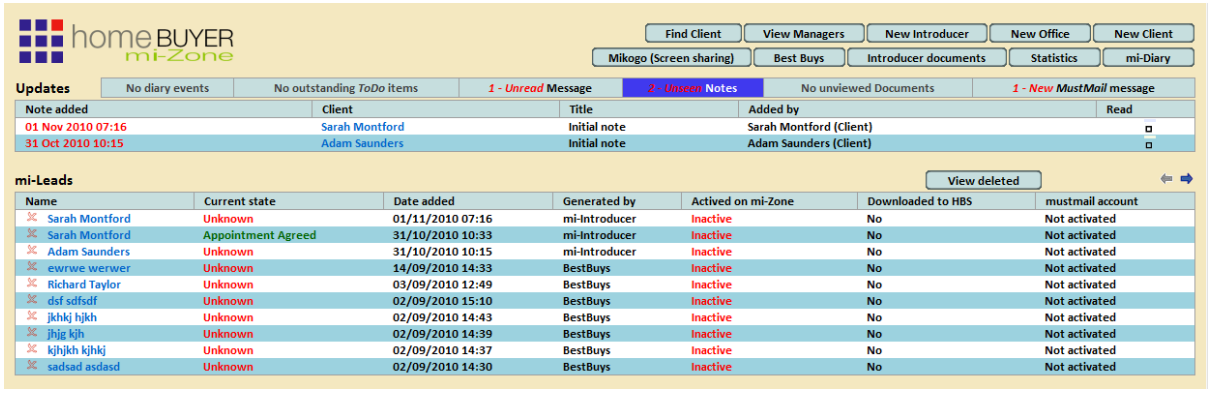
07:16
Reply

Sarah,
You have requested an appointment with Alan Thompson from HBS arranged by
Appointment starting : 03 Nov 2010 11:00
ending : 03 Nov 2010 12:00

Advisor contact details :
Name : Alan Thompson
Phone number : 01234 453321 / 07711 121477
E-mail : richard.angliss@homebuyersystems.com
Address : 12 The Street Anytown AN12 6Th AN12 6Th

This is an automated e-mail by Home Buyer Systems Ltd, please do not reply

If you then go to your Dashboard you will see that you have a new message in the Notes of your Updates section. When you click on it the system will open the unread messages as shown below.



home BUYER mi-Zone

Find Client | View Managers | New Introducer | New Office | New Client
Mikogo (Screen sharing) | Best Buys | Introducer documents | Statistics | mi-Diary

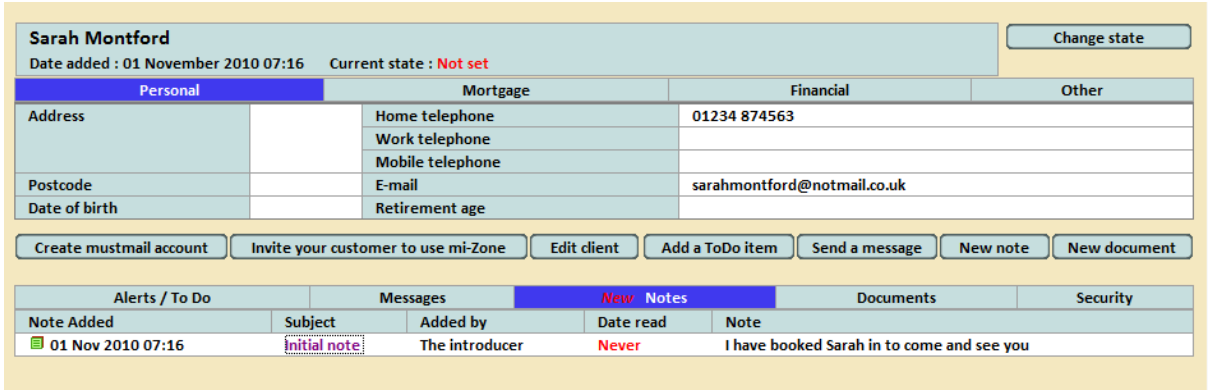
Updates | No diary events | No outstanding *ToDo* items | *1 - Unread* Message | *2 - Unseen* Notes | No unviewed Documents | *1 - New MustMail* message

Note added	Client	Title	Added by	Read
01 Nov 2010 07:16	Sarah Montford	Initial note	Sarah Montford (Client)	
31 Oct 2010 10:15	Adam Saunders	Initial note	Adam Saunders (Client)	

mi-Leads — View deleted

Name	Current state	Date added	Generated by	Actived on mi-Zone	Downloaded to HBS	mustmail account
Sarah Montford	Unknown	01/11/2010 07:16	mi-Introducer	Inactive	No	Not activated
Sarah Montford	Appointment Agreed	31/10/2010 10:33	mi-Introducer	Inactive	No	Not activated
Adam Saunders	Unknown	31/10/2010 10:15	mi-Introducer	Inactive	No	Not activated
ewrwe werwer	Unknown	14/09/2010 14:33	BestBuys	Inactive	No	Not activated
Richard Taylor	Unknown	03/09/2010 12:49	BestBuys	Inactive	No	Not activated
dsf sdfsdf	Unknown	02/09/2010 15:10	BestBuys	Inactive	No	Not activated
jkhkj hjkh	Unknown	02/09/2010 14:43	BestBuys	Inactive	No	Not activated
jhjg kjh	Unknown	02/09/2010 14:39	BestBuys	Inactive	No	Not activated
kjhjkh kjhkj	Unknown	02/09/2010 14:37	BestBuys	Inactive	No	Not activated
sadsad asdasd	Unknown	02/09/2010 14:30	BestBuys	Inactive	No	Not activated

When you click on the clients name it brings up the details of the appointment.



Sarah Montford — Change state
Date added : 01 November 2010 07:16 Current state : Not set

Personal		Mortgage	Financial	Other
Address		Home telephone	01234 874563	
		Work telephone		
		Mobile telephone		
Postcode		E-mail	sarahmontford@notmail.co.uk	
Date of birth		Retirement age		

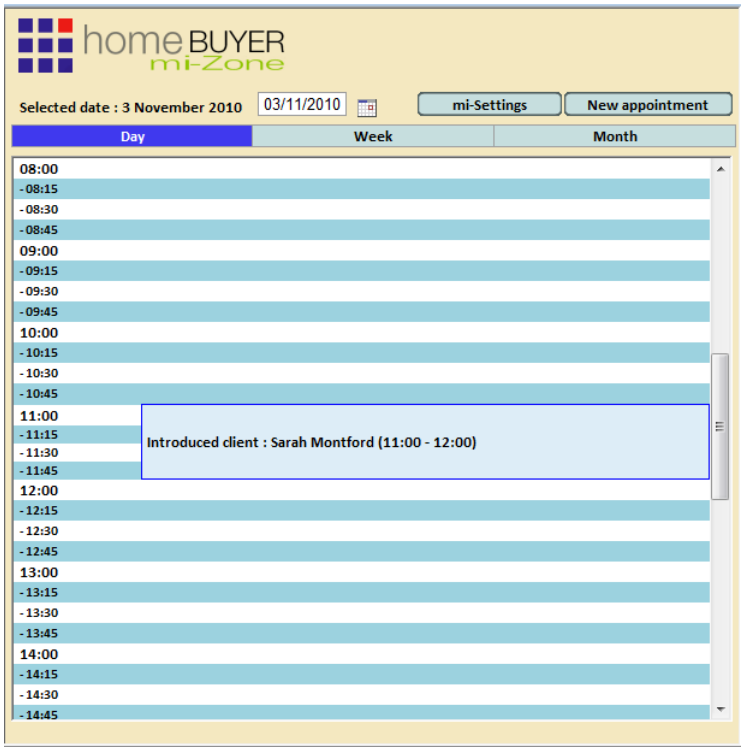
Create mustmail account | Invite your customer to use mi-Zone | Edit client | Add a ToDo item | Send a message | New note | New document

Alerts / To Do | Messages | *New* Notes | Documents | Security

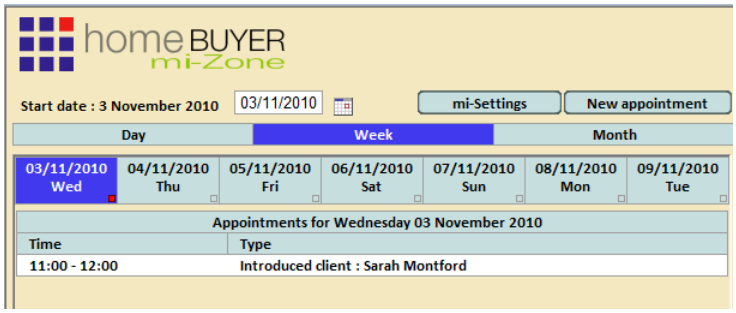
Note Added	Subject	Added by	Date read	Note
01 Nov 2010 07:16	Initial note	The introducer	Never	I have booked Sarah in to come and see you

HBS – THE TOTAL SALES PROCESS

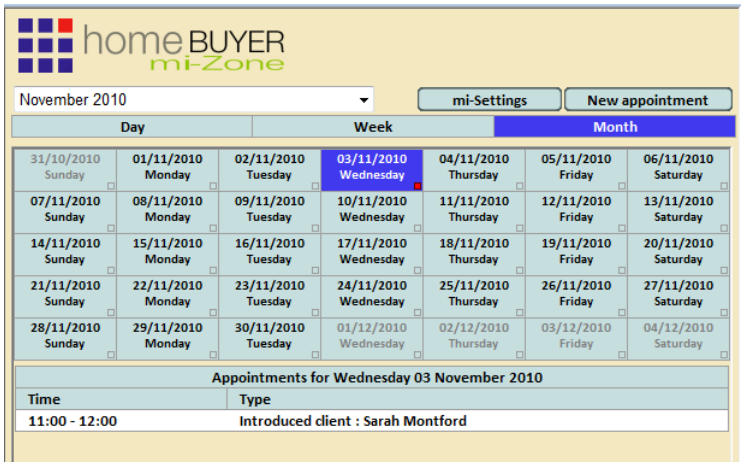
When you click on the Day view for the day of the appointment you will see the following:



When you click on Week you will see the following view. Please note that any days that have appointments booked have a red square in the bottom right hand corner. When you click on the day the details of the appointment/s are displayed:



Clicking on Month you get the following view:



Again for any day that appointments have been booked for you will see a red square. When you click on the day the details will appear underneath.

Statistics

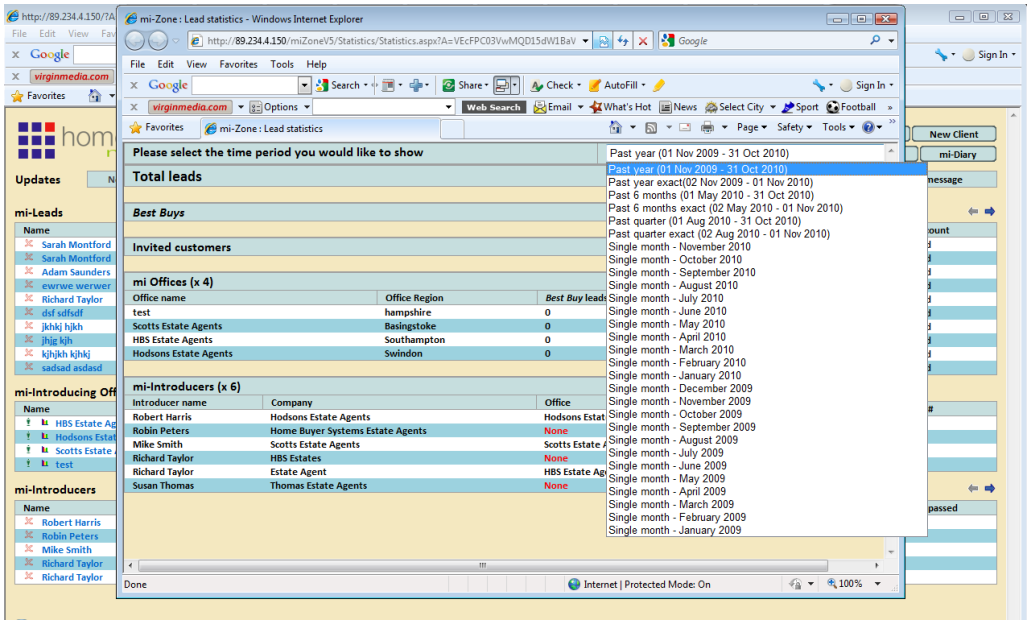
The statistics facility gives you the ability to manage your Introducer relationships and more importantly get the most out of them.

The statistics area gives you information on individuals, offices and whole companies. It gives you the opportunity to analyse performance and outcomes that ensure you and your Introducers gain the absolute maximum from working together.

You can use it to access where things may not be as good as they might be and provide the ability for you to work with the management and/or individuals to optimise lead and income generation.

HBS – THE TOTAL SALES PROCESS

You access this area from your Dashboard by clicking the “Statistics” button:



Then to select the time period you would like to look at click the box in the top right hand corner that will be pre-set to the last calendar year and you will see that you can select different time periods.

Click on the one you wish to view and the details will be displayed.

Conclusion

We hope that you find this simple but effective system both enhances your existing introducer relationships but also gives you the ability to win new ones.

If you have any questions or need any help please do not hesitate to let us know by calling us on 01730 829829 or e-mailing us at enquiries@homebuyersystems.com